

Halsall Associates Case Study



Engineering firm creates self-service collaboration environment – putting the power of business communications into the hands of employees and clients.

Background

Founded in 1956, Halsall Associates provides personalized engineering services to clients around the globe. Headquartered in Toronto, Canada, Halsall employs more than 340 people with technical expertise that spans building design; building evaluation and renewal; as well as green strategies for facilities and communities. In addition, its sister companies Loop Initiatives and Pivotal Projects provide sustainability management consulting and project management services respectively.

Timely information exchanges drive Halsall's operations, with colleagues and clients sharing data-intensive files such as computer-aided design (CAD) files, floor plans, and contract documents on a daily basis. But these external exchanges go well beyond just hitting "send." Halsall team members need to closely collaborate with clients on existing project materials. Not to mention, many of the documents need to be updated and accessed regularly to support the firm's consultative approach to design and engineering – with information gaps potentially impacting employee productivity and ultimately, client service.

Challenges

As part of many customer engagements, Halsall manages the tendering process for clients, overseeing incoming bids from various contractors for upcoming projects. With tendering packages released on a weekly basis – with up to a dozen bidders per project – sharing each individual bid with clients can be an overwhelming and confusing process, particularly when sent as piecemeal as they are received.

Traditionally, employees relied on IT to create an FTP site to share documents, or they burned the files to a CD or thumb drive – both inefficient and time consuming options. More critically, both were simply delivery mechanisms, and neither provided the true document sharing capabilities that Halsall really needed.

While the firm prides itself on timely, proactive business communications, the reality was that its methods of sharing critical documents were not keeping pace. Once a document was sent, Halsall employees had no way of knowing if the user received the file, who accessed the document, if it was updated, or if comments were added –

hindering their ability to provide expert counsel until the file was manually returned.

"Creating a self-service collaborative environment was key for us – allowing employees to work smarter, faster, and more effectively," said Noman Ahmed, IT Infrastructure Specialist with Halsall Associates. "We wanted to allow employees and clients to share information when and where needed without relying on IT – focusing on the project at hand and improving the level of customized service."

The firm realized that it needed more than a file transfer solution. Employees needed to be able to securely share key documents, while also managing the flow of information. They needed to provide access to necessary parties, gaining real-time visibility into document status, and allowing staff and clients to work together to drive projects forward.

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On the project management side, Pivotal often has to transfer large files between team members; and transferring 30MB files by email just wasn't possible. "One of the biggest benefits of the Accellion system for Pivotal is the ability to share large files with external parties: whether to manage design reviews; tender calls to contractors; or regular client update. Life is a lot easier with Accellion," says Farouk Janmohamed, Project Manager with Pivotal Projects.

Solution

Halsall investigated several vendor offerings and found that Accellion was the only vendor that addressed all three of the firm's must-haves: support for file collaboration, ease-of-use to reduce IT's involvement, and extensive end user file management capabilities. Halsall tested Accellion Secure Collaboration™ in its production environment and ultimately implemented the solution enterprise-wide.

"Everything we do is based on a collaborative, team-based approach, so we needed a solution that supported this philosophy," said Ahmed. "Now, our staff does not think twice about how to share documents. Accellion is the go-to source for all internal and external interactions."

100 percent of the Accellion integration was handled internally with end users quickly up and running –creating secure workspaces to make files easily available for review, comments, and updates. Halsall's employees simply need a client's email address to create a new workspace and then are free to upload and download files as often as needed, with users notified when new or updated documents are available. Users can also easily search for desired files or folders – a key benefit to help manage the high volume of documents during the tendering process.

Now, with Accellion, employees can create one workspace per tender package, providing exclusive access to bidding contractors and eliminating document confusion. For ongoing design and engineering projects, employees rely on a single Accellion workspace for each property, providing a one-stop source for exclusive information on floor plans, surveys and contract documents. Accellion is also used to support ongoing project management, making progress reports and weekly/monthly tracking updates available to clients and partners.

Regardless of the type of project, Halsall staff members can maintain and contribute to an active conversation thread for all documents, adding and reviewing comments, soliciting feedback, and easily monitoring past file versions if needed. This visibility extends to IT, providing an automated audit trail with access to file activity by sender, recipient, file size, date sent, or date accessed.

Halsall took advantage of Accellion's custom branding options, mirroring the interface to the firm's identity and naming the solution "ShareIT." Halsall's IT department cites Accellion's integration with Active Directory and single sign-on as a huge advantage, eliminating the need for users to remember additional passwords and for IT to create/delete new accounts due to personnel changes. While Halsall used to have hundreds of open activities with its FTP service, the IT group has set Accellion workspaces to automatically expire after six months, eliminating uncertainty about which files are active versus inactive.

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Specifications

Cimarex	
Deployed since	March 2011
# of Internal and external users	340 Internal Unlimited external
LDAP/AD integration	Yes
Custom web interface	Yes
Email integration	Yes

BENEFITS

- Improved client communications with key design and engineering documents easily shared, accessed and reviewed
- Boosted employee productivity by moving beyond straight file sharing to true file collaboration
- Reduced IT's management through Accellion's ease of use, single sign-on, and Active Directory integration
- Enabled proactive document management and visibility, with end user insight into file revisions and commentary, while also supporting audit requirements
- Freed valuable storage capacity by diverting traffic from file servers